

SCHOOL FINANCIAL SERVICES TEAM

SFS Finance Bulletin

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COMMUNICATION CHANGE FOR THE 2009-10 SCHOOL FISCAL YEAR

District administrators should be alert to a change in the way in which the School Financial Services (SFS) Team communicates with them beginning July 1, 2009. District administrators will no longer receive general paper mailings from the team. Rather, administrators will receive notification by e-mail of a newsletter posted to the Internet. This change is a result of the team's efforts to improve communication with school districts and to implement a cost savings strategy for the team and the department. It should be noted that the team's current "dpifinance" listserve will continue and subscribers will receive notification of the posting of the newsletters.

An important element of this change is the new PI 1500 District Contacts report. Superintendents or their designees will complete an Internet report that serves two purposes:

1. Identify district staff to receive various communications from the SFS team such as newsletter alerts, listserve messages and e-mails related to specific programs such as transportation, special education, and annual report submissions.
2. Identify and authorize staff to submit data reports to the department such as the PI 1505 Annual Report, the PI 1563 Pupil Count Report, and PI 5000 Transfer of Service Report. This change provides improved internal control and data security for both the district and the department.

This new report will open on June 3 and will be due June 19. More information about this report will be forthcoming over the next few weeks.

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SFS Team Directory

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AMERICAN ECONOMIC RECOVERY AND REINVESTMENT ACT OF 2009

The department has established a website located on the agency's home web page or directly at <http://dpi.wi.gov/recovery/index.html> for the purposes of providing information and guidance to school districts as it becomes available. In addition to providing general information about the new legislation, there are additional links that have been developed by various teams within the agency who have responsibility for the administration of some of the federal stimulus programs.

As an example, the finance team is responsible for the Qualified Zone Academy Bonds (QZAB) and the Qualified School Construction Bonds Programs (QSCB). There are links to this information on the department's stimulus website and the School Financial Services Team home webpage. All available information about these programs will be found on these websites including a description of the program, funding, application requirements, and contact information. District staff should direct their questions to the department contacts listed for each federal stimulus program.

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2009-11 STATE BIENNIAL BUDGET STATUS

The governor's budget proposals have been introduced to the legislature as Assembly Bill 75. The department's summary of his proposals is available at <http://dpi.wi.gov/pb/pdf/govbudsum0911lite.pdf> and the actual proposed statutory language changes at <http://www.legis.state.wi.us/2009/data/AB-75.pdf>. Additionally, the Legislative Fiscal Bureau has completed its analysis of the governor's proposal and it is located on the web at <http://www.legis.state.wi.us/lfb/2009-11Budget/Governor/tableofcontents.htm>.

The legislature's Joint Committee on Finance has scheduled a number of meetings in late March around the state for the purpose of soliciting public input relating to the development of the biennial budget. Upon completion of the hearings, the Committee will accept amendments and vote on the proposal. Once completed, the budget as amended by the Joint Finance Committee will be forwarded to the Assembly and Senate for deliberation and vote. If there are differences in the budget that are approved by each house, a conference committee made up of members of each house will convene to discuss the differences and hammer out a compromise, which then goes back to each house for a vote. Once approved by the legislature, the governor will determine if any vetoes are appropriate.

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2009 SPRING FINANCE WORKSHOPS

Due to budgetary constraints the School Financial Services Team spring finance workshops will be held virtually with the exception of the live presentation on March 26 at the site of the WASBO Accounting Conference in the Wisconsin Dells. The workshop will be divided into webcast sections such that viewers can pick and choose the webcast topics for which they are most interested. Topics included are updates on revenue limits, equalization aid, transfer of service, state biennial budget, summer school auditing, new PI 1505 Special Education Annual report, comparative cost/revenue, PI 1500 District Contacts report, residency clarification, HRA and OPEB updates. These presentations will be available under the "Webcast Presentations" link of the finance team's home web page.

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Calendar of Events

April 2009						
S	M	T	W	Th	F	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Apr 03 Spring Finance Workshop posted to website

Apr 27 [Common School Fund Payment](#)

May 2009						
S	M	T	W	Th	F	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	31
31						

May 01 [Membership Audit Due](#)

May 15 [PI 1547 Transportation](#) and [PI 1505 Calendar Reports Open](#)

May 18 [Children at Risk Payment](#)

May 22 Mailing to Districts

June 2009						
S	M	T	W	Th	F	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Jun 01 [State Tuition Payment](#)

Jun 03 [PI 1500 District Contacts](#)
[PI 1804/1805 Summer School Reports Open](#)

Jun 08 [SPED/SAGE/4K Grant Aid Payment](#)

Jun 15 [Equalization/Special Adjustment Special Transfer/CCDEB Supplemental SPED/Transporting Students Over Ice/High Cost Special Education Aid Payment](#)

Jun 19 [PI 1500 District Contacts Report Due](#)

Jun 22 [SAGE Aid Payment](#)

Jun 26 [Foster/Group Home Report Due](#)

The PI 5000 Revenue Limit Transfer of Service Report

Districts must complete the Transfer of Service (TOS) through the internet based application. Paper submissions will not be accepted. The due date for all Part A submissions is extended to August 7. However, it is strongly suggested that districts start the process early so that they have time to get the proper verification from the pupil's previous district. Once verifications are done, districts can submit the TOS summary, which is the final required step for the actual TOS request. Amendments to the TOS summary can be made at any time up to the due date.

Log on to this [On-line application](#) by entering the School Financial Service (SFS) Team Reporting Portal directly at: <https://www2.dpi.state.wi.us/safr/> or the TOS web page from the left side bar at the SFS Team at: <http://dpi.wi.gov/sfs/>. Your district's password can be used to enter the report.

Using this web based application, you will not need to manually send paper copies of individual requests through the mail for either previous district verification or for submission to the department. However, the requesting district is still responsible for making sure verifications have been completed and are on time. To help make this process run smoothly, it is imperative that every district make sure your TOS contact information is up to date.

Districts can change or amend their listed TOS contact by going to the reporting portal located at the SFS Team web page. Your password will be needed. Navigate to your school district and click on "District Contacts." You can choose a name to amend or click on "Add a Contact." Following the contact information at the end of the page will be options for identifying that individual as a Special Education contact, LEP contact, contact for both, or contact for none. Choose "None" if you wish to remove them as a TOS contact.

There are some revisions to this data collection application based upon feedback from district staff that completed this report for the first time last year. However, the actual online application process will be very similar. A noticeable change will be that the TOS home page (Dashboard) will look more like our other SAFR applications.

Contact Brad Adams by e-mail at bradley.adams@dpi.wi.gov or by telephone at (608) 267-3752 should you have questions.

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2009 Summer School

Each year the department provides a guidance letter to school districts intending to offer summer school. Districts will receive this letter in the department's bi-weekly mailing dated March 26. The letter will also be posted to the finance team's website under "Mailings" on the left hand scan bar, under "Late Breaking Information" and directly at http://dpi.wi.gov/sfs/summ_sch.html. Please ensure that the district's summer school coordinator reviews this document as it does contain a number of clarifications including the claiming of membership for equalization aid and revenue limit purposes.

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School Financial Services Contacts

Please contact one of the following School Financial Services Team consultants should you have questions:

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